Designations employed in this publication do not imply the expression of any opinion on the part of the African Development Bank Group (AfDB), the Africa House at NYU and the Africa Travel Association concerning the legal status of any country or territory, or the delimitation of its frontiers. While effort has been made to present reliable information, the three organizations accept no responsibility whatsoever for any consequences of its use.

Statistics Department  
**Chief Economist Complex**  
Immeuble du Centre de commerce international d’Abidjan  
Avenue Jean-Paul II  
01 BP 1387  
Abidjan 01  
Côte d’Ivoire  
Tel: +225 20 26 33 25  
Email : Statistics@afdb.org  
www.afdb.org

New York University-Africa House  
New York University  
44 Washington Mews  
New York, NY, 10003, USA  
Tel: +1- 212-992-6584  
Email: africa.house@nyu.edu  
www.nyuafricahouse.org

Africa Travel Association  
152 Madison Avenue, Suite 1702  
New York, NY, 10016, USA  
Tel: +1- 212-447-1357  
Fax: +1-212-213-4890  
Email: info@africatravelassociation.org  
www.africatravelassociation.org
Africa Tourism Monitor

VOLUME 2 · ISSUE 1
NOVEMBER 2014
ACKNOWLEDGEMENTS

The Africa Tourism Monitor is a joint publication of the African Development Bank (AfDB), the Africa House at New York University (NYU) and the Africa Travel Association (ATA).

Statistics Department
Chief Economist Complex
African Development Bank Group
Immeuble du Centre de commerce international d’Abidjan
Avenue Jean-Paul II
01 BP 1387
Abidjan 01, Côte d’Ivoire
Tel: +225 20 26 33 25
Email: Statistics@afdb.org
www.afdb.org/statistics

New York University-Africa House
New York University
44 Washington Mews
New York, NY, 10003, USA
Tel: +1- 212-992-6584
Email: africa.house@nyu.edu
www.nyuafricahouse.org

Africa Travel Association
152 Madison Avenue, Suite 1702
New York, NY, 10016, USA
Tel: +1- 212-447-1357
Fax: +1-212-213-4890
Email: info@africatravelassociation.org
www.africatravelassociation.org

African Development Bank Team:
Charles Lufumpa, Director, Statistics Department;
Beejaye Kokil, Manager, Economic & Social Statistics Division; Nirina Letsara and Koua L. Kouakou, Statisticians, Statistics Department. The editor for this issue was Sandra Jones (Consultant).

Africa House, New York University Team: Prof. Yaw Nyarko, Director; Eddie Mandhry, Associate Director

Africa Travel Association Team: Edward Bergman, Executive Director; Angela Gerrow, Membership Services; Andrea Papitto, Trade Relations and Communications; Declan Galvin, Intern

Contributors and Special Thanks: Martine Bakker, Georgette James, Dr. Hannah Messerli, Sharon Roling

Photo Contributions by:
Egyptian Tourism Authority, Gambia Tourism Board, Magical Kenya, Tanzania Tourist Board, Uganda Tourism Board, Uganda Wildlife Authority, Zimbabwe Tourism Authority, Delta Air Lines, New York University - Africa House, Crop to Cup, Marie Claire Andrea, Mathias Mugisha, Andrea Papitto
The African Development Bank (AfDB) is pleased to present this second edition of the *Africa Tourism Monitor*, produced in partnership with Africa House - New York University and the Africa Travel Association (ATA).

Tourism, as one of the fastest-growing and most dynamic sectors, has tremendous potential to boost inclusive economic growth across the continent and reduce poverty, which are two of the African Development Bank’s overarching objectives. The World Tourism Organization (UNWTO) projects Africa’s international tourist arrivals will rise to 134 million in 2030 – that is an increase of 106% from the 2013 level of 65 million arrivals.

One reason for this rise is an influx of new visitors from emerging economies in Asia, Central and Eastern Europe, all seeking to experience the cultural heritage, extraordinary wildlife, and dramatic landscapes unique to our beautiful region.

In 2013 African economies grew at approximately 4% on average, compared to 3% for the world economy, with broad variations across different regions and income groupings. Growth in sub-Saharan Africa was 5% in 2013 and is projected to rise to around 5.8% in 2014. Excluding South Africa, the GDP growth figures for SSA are estimated at 6.1% for 2013 and 6.8% for 2014. West and East Africa recorded the fastest expansion at over 6%.

Low-income countries also recorded growth of above 6%, while the upper-middle-income countries in North and Southern Africa grew more moderately at 3%. The African Development Bank recognizes, however, that it is not enough simply to sustain these growth levels, commendable though they are. What is equally important is for this growth to be socially inclusive, green, and sustainable. In this, the tourism sector has a vital role to play, opening up lesser developed rural areas, creating job opportunities, and engaging local communities to enlist their participation.

While we acknowledge the progress that has been made by many African nations, and as we look to the future and work toward a more equitable distribution of wealth, yet we must acknowledge the serious challenges that still confront the region. I have already touched on social exclusion and income inequality, but must also mention the lack of infrastructure, as well as vulnerability to social, political, and environmental risks.

The recent Ebola epidemic in West Africa has drawn into sharp focus critical national and regional infrastructural challenges in the health and transportation sector, as well as a profound shortage of resources, both financial and human, to tackle the disease. The Bank has long been a proponent in all its programs and projects of close collaboration between all stakeholders – governments, regional economic communities, development agencies and the international community generally – for better results, whatever the crisis and whatever the sector. And the Ebola crisis is certainly no exception. This devastating humanitarian crisis is of especial concern for the tourism sector, as the risk perception will deter many travelers to the Western subregion, and possibly even to the continent as a whole, thereby impacting foreign exchange earnings and investment.
Peace and security breakdowns in the Central African Republic, South Sudan, and most recently Burkina Faso also threaten socioeconomic progress and hard-won gains from the past. A strong commitment from Africa and the international community is required to help address these crises. While risks remain heightened in some regions, a number of conflicts on the continent have been heading towards resolution. Today, most of Africa is at peace and moving toward democracy. In 2014-15, 600 million Africans, including many first-time voters, will go to the polls to elect their leaders.

Progress is still needed to promote greater regional integration in terms of lifting travel and visa restrictions. Whereas the majority of North Americans and Europeans enjoy liberal access to the continent, at least two-thirds of African countries demand visas from Africans traveling outside their native land. Greater cooperation is needed between governments to facilitate the transborder movement of persons within Africa. Several regional economic communities have made some headway in this area. ECOWAS, for example, is developing a common migration policy, while the recently launched single visa scheme between Kenya, Rwanda, and Uganda is a welcome move in the right direction.

Given a conducive enabling environment, tourism can serve as a prime catalyst to spur inclusive, green and sustainable growth across the continent. The steady influx of new international travelers from Eastern and Central Europe, South America and Asia – as well as from the traditional heartlands of the United States and Europe – attests to Africa’s enduring appeal as an exciting tourist destination which needs to be harnessed for the socioeconomic advancement of all its people in the long term.

Dr. Charles Leyeka Lufumpa
Director
Statistics Department
African Development Bank Group
Welcome to the second edition of Africa Tourism Monitor, a joint publication of the African Development Bank (AfDB), New York University – Africa House, and the Africa Travel Association (ATA). This report is inspired by the first two issues of State of Tourism in Africa, which were prepared with our partners at the World Bank, who have also supported this report.

The theme of this year’s report is “Leveraging Africa’s Human Capacity for Tourism Development.” This is a crucial component of tourism development for all destinations, but especially for Africa, as it harnesses the potential to increase trade, create socio-cultural linkages, and spur economic and job opportunities.

The report delves into timely topics like building infrastructure for tourism development: regional cooperation; training and capacity building; citizen diplomacy; cultural heritage; tourism product development; hotel chain development pipelines; connecting the continent via air access; inclusive growth and sustainable tourism strategies; and engaging rural communities. The facts, figures, articles, and case studies in this issue illustrate how travel and tourism should engage local populations and community stakeholders, who can participate and thrive through the travel and tourism sector.

We would like to thank our partners who contributed to this edition. We look forward to ongoing collaboration as we aim to make a compelling case for the investment potential and growth of Africa’s tourism sector. Together, we can ensure that Africa strengthens its competitiveness in one of the world’s fastest-growing and most dynamic sectors.

Professor Yaw Nyarko  
Director, Africa House  
New York University

Edward Bergman  
Executive Director  
Africa Travel Association

Sources: United Nations World Tourism Organization (UNWTO) and World Travel and Tourism Council (WTTC)
AFRICA TOURISM: THE NUMBERS

According to the United Nations World Tourism Organization (UNWTO),1 2013 was another record year for the number of tourists traveling internationally. International tourist arrivals exceeded UNWTO expectations and sustained a worldwide growth of 5%, reaching 1,087 million, compared to 1,035 million in 2012. Africa kept pace with aggregated global trends and saw 5% more tourist arrivals in 2013 compared to 2012. The number of international visitors to Africa in 2013 was 65.1 million. The most popular African destinations for international travelers in 2013 were the North African countries of Morocco, Egypt, and Tunisia while South Africa and Zimbabwe were the leading destinations in Sub-Saharan Africa.

---


<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Morocco</td>
<td>9.29</td>
<td>9.34</td>
<td>9.38</td>
<td>10.05</td>
</tr>
<tr>
<td>Egypt</td>
<td>14.05</td>
<td>9.50</td>
<td>11.20</td>
<td>9.17</td>
</tr>
<tr>
<td>South Africa</td>
<td>8.07</td>
<td>8.34</td>
<td>9.19</td>
<td>9.51</td>
</tr>
<tr>
<td>Tunisia</td>
<td>6.90</td>
<td>4.79</td>
<td>5.95</td>
<td>6.27</td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>2.24</td>
<td>2.42</td>
<td>1.79</td>
<td>1.83</td>
</tr>
</tbody>
</table>

*Note: In 2012, the 5th country in Africa with the highest tourist arrivals was Algeria with 2.63 million.

Source: United Nations World Tourism Organization (UNWTO)

<table>
<thead>
<tr>
<th>International Tourist Arrivals (2013)</th>
<th>MILLIONS</th>
<th>PERCENTAGE OF GLOBAL TOURIST ARRIVALS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>565.0</td>
<td>52.0%</td>
</tr>
<tr>
<td>Asia &amp; The Pacific</td>
<td>248.7</td>
<td>22.9%</td>
</tr>
<tr>
<td>North America</td>
<td>110.5</td>
<td>10.2%</td>
</tr>
<tr>
<td>Caribbean, Central America, South America</td>
<td>57.8</td>
<td>5.3%</td>
</tr>
<tr>
<td>Africa</td>
<td>65.1</td>
<td>6.0%</td>
</tr>
<tr>
<td>Middle East</td>
<td>39.6</td>
<td>3.6%</td>
</tr>
<tr>
<td>World</td>
<td>1,086.7</td>
<td>100%</td>
</tr>
</tbody>
</table>

Source: UNWTO, World Tourism Organization
The African Development Bank (AfDB) in collaboration with New York University-Africa House has developed the “Africa tourism data portal,” a user-friendly tool dedicated to providing professionals with access to tourism-related data from a range of international and national sources. This portal is part of the AfDB’s “Africa Information Highway” initiative aimed at improving data collection, management and dissemination in Africa.

www.tourismdataforafrica.org
TOURISM’S CONTRIBUTION TO EMPLOYMENT

The travel and tourism industry is responsible for directly employing 3.4% of the world’s population. Regionally, 5.3% of the workforce in North Africa and 2.4% of the workforce in Sub-Saharan Africa are directly engaged in tourism and the related industries such as hospitality, leisure, and transportation service provision. The World Travel and Tourism Council (WTTC) estimates that more than 2.79 million people were directly employed by the tourism industry in Africa’s top five destination countries alone in 2013.

<table>
<thead>
<tr>
<th>Country</th>
<th>% of Total Workforce</th>
<th>Directly Employed in Tourism</th>
<th>% of Total Workforce</th>
<th>Total Employed in Tourism (Direct, Indirect and Induced)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seychelles</td>
<td>22.7%</td>
<td>9,700</td>
<td>56.5%</td>
<td>24,100</td>
</tr>
<tr>
<td>Mauritius</td>
<td>10.8%</td>
<td>62,000</td>
<td>23.9%</td>
<td>137,500</td>
</tr>
<tr>
<td>Cabo Verde</td>
<td>14.5%</td>
<td>32,000</td>
<td>38.4%</td>
<td>84,500</td>
</tr>
<tr>
<td>Morocco</td>
<td>7.6%</td>
<td>814,000</td>
<td>16.7%</td>
<td>1,798,000</td>
</tr>
<tr>
<td>Tunisia</td>
<td>6.6%</td>
<td>228,000</td>
<td>13.8%</td>
<td>475,000</td>
</tr>
</tbody>
</table>

Source: World Travel and Tourism Council (WTTC)

Notes:
* “Direct tourism employment” includes those dealing directly with tourists in hotels, travel agencies, airlines and other passenger transportation services (excluding commuter services). It also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists.
* Indirect and induced tourism employment includes jobs in ancillary services generated by government collective spending on tourism (e.g. tourism marketing and promotion; tourist information bureaux and administrative services), resort security services, sanitation workers; as well as jobs generated by the spending of those directly and indirectly employed in the tourist industry.

<table>
<thead>
<tr>
<th>Country</th>
<th>’000 Jobs</th>
<th>Direct Employment (as % of Total Employment)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Egypt</td>
<td>1,251.0</td>
<td>5.1%</td>
</tr>
<tr>
<td>South Africa</td>
<td>645.5</td>
<td>5.3%</td>
</tr>
<tr>
<td>Tanzania</td>
<td>402.5</td>
<td></td>
</tr>
<tr>
<td>Kenya</td>
<td>226.3</td>
<td></td>
</tr>
<tr>
<td>Madagascar</td>
<td>224.9</td>
<td></td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>43.6</td>
<td></td>
</tr>
</tbody>
</table>

Source: World Travel and Tourism Council (WTTC)

<table>
<thead>
<tr>
<th>Region</th>
<th>% of Total Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>World Average</td>
<td>3.4%</td>
</tr>
<tr>
<td>Africa</td>
<td>2.9%</td>
</tr>
<tr>
<td>North Africa</td>
<td>5.3%</td>
</tr>
<tr>
<td>Sub-Saharan Africa</td>
<td>2.4%</td>
</tr>
<tr>
<td>Egypt</td>
<td>5.1%</td>
</tr>
</tbody>
</table>

Source: World Travel and Tourism Council (WTTC)
African Heads of States and Governments recognize the potential contribution of tourism to the growth and transformation of the continent, given that Africa is endowed with rich and diverse cultures, landscapes, and biodiversity. Consequently, tourism is one of the strategic areas in the New Partnership for Economic Development (NEPAD) framework, and is identified there as a key driver for socio-economic growth.

To foster the development of tourism in the continent, the NEPAD Tourism Action Plan (TAP) was formulated under the guidance of African Ministers of Tourism, who convene annually under the auspices of the World Tourism Organization (WTO) Commission for Africa (CAF). The TAP was adopted at the 3rd General Assembly of the African Union (AU) in July 2004 in Addis Ababa, Ethiopia. Since the adoption of the TAP, the continent has been experiencing growth in the tourism sector despite facing major challenges, including a serious infrastructure deficit.

TAP was primarily established to harness Africa’s vast endowment of geographical assets and cultural heritage through promotion of the tourism sector. Indeed, the continent’s abundant natural resources have contributed an average of 5.2% annually to the continent’s economic growth over the past decade, including through foreign exchange earnings. In 2013 alone, the continent’s receipts from international tourism were USD 34.2 billion. Therefore, it comes as no surprise that tourism as a service sector has been acknowledged as a driver of socio-economic development and growth in Africa. Moreover, it has been identified as such in the African Union (AU) Agenda 2063, which sets out a long-term strategy to “optimize use of Africa’s resources for the benefit of all Africans” and to accelerate development and integration across the continent.

Despite the progress made in the tourism industry, most African countries have yet to reach their full potential. A myriad challenges face the tourism sector: the urbanization of the continent is faster than anywhere else in the world and by 2025 half of the African population will live in cities. The issue of urbanization will bring serious challenges of integrated waste management, transport and pollution, which will impact touristic activities. Additionally, slow visa facilitation; low investment levels; the capacity gap in the hospitality service industry; poor connectivity and infrastructure are major impediments to tourism growth and sustainability. For instance, what should be a normal 6-hour trip from West to Southern Africa can take...
as long as 48 hours due to poor air connectivity.

On the other hand, Africa is experiencing low levels of intra-regional economic exchange, while it also has the smallest share of global trade of all regions. Africa is the least integrated continent in the world. Infrastructure inefficiencies are costing Africa billions of dollars annually and are stunting growth. Bridging the gap in infrastructure is vital for economic advancement and sustainable development. However, this can only be achieved through subregional and continental cooperation and solution finding. The Program for Infrastructure Development in Africa (PIDA) encourages regional cooperation as a means of building mutually beneficial infrastructure. It helps to strengthen the ability of countries to trade and establish regional value chains for increased competitiveness, as well as the free movement of African citizens. As the unique strategic and sectoral framework to accelerate the physical integration of the continent, PIDA promotes the development of infrastructure projects in the areas of transport, energy, information and telecommunications technologies, as well as transboundary water supplies.

The United Nations World Tourism Organization (UNWTO) 2014 report, *Tourism Towards 2030*, predicts that tourism arrivals in Africa will reach 134 million by 2030, from the present-day level of 65 million. This is a strong growth that could significantly contribute to the GDP, job creation, and transformation of African countries and the continent at large. However, for this projection to become a reality, there is a need for an enabling environment that would facilitate infrastructure development, investment in human capacity development and growth in the Africa market to promote regional tourism.

In this regard, the importance of infrastructure to tourism development and growth in the continent cannot be over-emphasized hence PIDA implementation is imperative. This will require building strong partnerships and the collective effort and actions of African governments, the private sector, civil society, regional and continental institutions, as well as development partners.

Dr. Ibrahim Assane Mayaki  
Chief Executive Officer  
New Partnership for Africa’s Development (NEPAD)  
www.nepad.org
In early 2014, W-Hospitality Group undertook its annual survey of the pipelines of the hotel groups that already operate, or plan to operate, in Africa. We surveyed all the international hotel groups with an interest in Africa, as well as the home-grown groups that operate in more than one country on the continent. The survey drew participation from 27 hotel chains, representing a total of 215 hotels and almost 40,000 rooms planned or under development.

The number of hotel rooms planned in Sub-Saharan Africa grew by approximately 30% in 2014, in contrast to North Africa, which saw a decrease of approximately 10%. This decrease for North Africa is indicative of the negative impact of the social unrest in many of the markets in the region, especially in Egypt, which has dampened investment in existing projects and curtailed the number of new deals.

Our survey reported pipeline data for 38 countries. The most notable addition was South Sudan, Africa’s newest country, which is offering 435 hotel rooms in two hotels. Of the 10 African countries which previously had no existing branded hotel supply at all, seven now have hotels in the pipeline, including Sierra Leone and DRC, which saw the openings of the Radisson Blu Mammy Yoko, Freetown, and the Kempinski Kinshasa, respectively.

A subregional breakdown reveals North Africa to have the largest pipeline (41.4%), albeit with only five countries. In contrast, the Southern African subregion, which also has five countries in the survey, has the smallest proportion of the development pipeline, at just 6.1%. Several countries in the subregion, including Botswana and Namibia, have no new chain hotels planned.

West Africa has the second-largest proportion in the pipeline (34.1%), with 14 countries, including heavyweights such as Nigeria, Ghana and Senegal. These three countries, alongside the five North African nations, plus Ethiopia and South Africa, make up the top 10 markets in terms of planned new hotels and rooms.

Nigeria ranks highest both in terms of the number of hotels and the number of rooms. Its pipeline is almost 40% larger than Morocco, which is placed second. Both Libya and Egypt have fewer hotels but much larger properties in the pipeline, close to double the average size in Nigeria and Morocco. In fact, Libya is a top performer, increasing its pipeline by 62% from 2013 with the addition of three hotels and 869 rooms.

### 2014 Hotel Chain Development Pipelines in Africa – Regional Summary

<table>
<thead>
<tr>
<th>Region</th>
<th>2014</th>
<th>2013</th>
<th>2012</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOTELS</td>
<td>ROOMS</td>
<td>HOTELS</td>
<td>ROOMS</td>
<td>HOTELS</td>
<td>ROOMS</td>
</tr>
<tr>
<td>North Africa</td>
<td>73</td>
<td>16,449</td>
<td>73</td>
<td>18,065</td>
<td>77</td>
</tr>
<tr>
<td>Sub-Saharan Africa</td>
<td>142</td>
<td>23,283</td>
<td>115</td>
<td>18,191</td>
<td>100</td>
</tr>
<tr>
<td>TOTAL</td>
<td>215</td>
<td>39,732</td>
<td>188</td>
<td>36,256</td>
<td>208</td>
</tr>
</tbody>
</table>
### 2014 Hotel Chain Development Pipelines in Africa
#### Top 10 Countries by Number of Rooms

<table>
<thead>
<tr>
<th>HOTELS</th>
<th>ROOMS</th>
<th>AVERAGE SIZE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Nigeria</td>
<td>40</td>
</tr>
<tr>
<td>1</td>
<td>Morocco</td>
<td>29</td>
</tr>
<tr>
<td>1</td>
<td>Egypt</td>
<td>15</td>
</tr>
<tr>
<td>1</td>
<td>Algeria</td>
<td>15</td>
</tr>
<tr>
<td>1</td>
<td>Libya</td>
<td>7</td>
</tr>
<tr>
<td>1</td>
<td>Tunisia</td>
<td>7</td>
</tr>
<tr>
<td>7</td>
<td>South Africa</td>
<td>9</td>
</tr>
<tr>
<td>8</td>
<td>Ghana</td>
<td>6</td>
</tr>
<tr>
<td>9</td>
<td>Ethiopia</td>
<td>6</td>
</tr>
<tr>
<td>10</td>
<td>Senegal</td>
<td>5</td>
</tr>
</tbody>
</table>

### 2014 Hotel Chain Development Pipelines in Africa
#### Top 10 Chains by Number of Planned Hotels and Rooms

<table>
<thead>
<tr>
<th>RANK BY HOTELS</th>
<th>RANK BY ROOMS</th>
<th>CHANGE FROM 2013</th>
<th>AVERAGE SIZE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Carlson Rezidor</td>
<td>30</td>
<td>6,248</td>
</tr>
<tr>
<td>2</td>
<td>Marriott</td>
<td>26</td>
<td>6,165</td>
</tr>
<tr>
<td>3</td>
<td>Hilton Worldwide</td>
<td>25</td>
<td>5,243</td>
</tr>
<tr>
<td>4</td>
<td>Starwood</td>
<td>16</td>
<td>3,499</td>
</tr>
<tr>
<td>5</td>
<td>Mangalis</td>
<td>15</td>
<td>2,210</td>
</tr>
<tr>
<td>6</td>
<td>Best Western</td>
<td>10</td>
<td>2,055</td>
</tr>
<tr>
<td>6</td>
<td>Accor</td>
<td>10</td>
<td>1,587</td>
</tr>
<tr>
<td>6</td>
<td>Swiss International</td>
<td>10</td>
<td>1,567</td>
</tr>
<tr>
<td>9</td>
<td>Louvre</td>
<td>9</td>
<td>1,455</td>
</tr>
<tr>
<td>10</td>
<td>Azalai</td>
<td>8</td>
<td>1,229</td>
</tr>
</tbody>
</table>
In terms of the hotel groups themselves, Carlson Rezidor, Hilton Worldwide and Marriott are the most active, with a combined 81 hotels planned (almost 40% of the total pipeline). They also take the first three top rankings in the number of hotel rooms planned, with a combined total of 17,656 rooms (44.4% of the total).

Marriott increased its pipeline by 34%, and this is before its purchase of Protea, whose pipeline is not included. Starwood also recorded a significant increase of 39% year-over-year, adding four more countries to its pipeline compared to 2013. Of its 16 projects planned on the continent, half are to be located in just two countries, namely Egypt and Nigeria.

It is, however, important to separate these projects by pipeline status: (i) those that are still being planned and (ii) those that are actively (or in some cases “passively”) under construction. “Passively” is especially true in the case of some new hotels in markets like Nigeria and Ghana, where work can remain suspended for extended periods (i.e. several years). In the Top 10 Chains by Pipeline Status, the three leading hotel groups maintain their dominant positions, while others, notably Accor, Rotana and Azalaï, drop out of the rankings, with a lower proportion of their pipeline rooms actually under construction.

While the pipeline data are all well and good, in many cases they represent just pieces of paper – and in some cases will remain so, as the hotels never get built. To be meaningful, these hotels need to start construction, and be open for business. But the signing of contracts is an important part of the process, enabling the owners to complete their design according to their partner’s brand standards, and to complete the financing. Africa – in terms of business development – can be frustratingly slow. However, the race is on and we should never forget that it is always the tortoise that wins, eventually!

W-Hospitality Group is a Lagos-based consulting practice specializing in the hotel industry in Africa. We have worked in 35 countries on the continent, advising on strategy, project viability, development, operations and disposals.

Trevor Ward, Managing Director
Dami Adepoju, Senior Consultant
W-Hospitality Group, Lagos, Nigeria
www.w-hospitalitygroup.com

---

**2014 Hotel Chain Development Pipelines in Africa**

**Top 10 Chains by Pipeline Status**

<table>
<thead>
<tr>
<th>RANK</th>
<th>COMPANY</th>
<th>HOTELS</th>
<th>ROOMS</th>
<th>TOTAL</th>
<th>ONSITE CONSTRUCTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Hilton</td>
<td>25</td>
<td>6,165</td>
<td>3,962</td>
<td>64%</td>
</tr>
<tr>
<td>2</td>
<td>Carlson Rezidor</td>
<td>30</td>
<td>6,248</td>
<td>3,078</td>
<td>62%</td>
</tr>
<tr>
<td>3</td>
<td>Marriott</td>
<td>26</td>
<td>5,243</td>
<td>3,225</td>
<td>62%</td>
</tr>
<tr>
<td>4</td>
<td>Starwood</td>
<td>16</td>
<td>3,499</td>
<td>1,858</td>
<td>53%</td>
</tr>
<tr>
<td>5</td>
<td>Mangalis</td>
<td>15</td>
<td>2,210</td>
<td>1,560</td>
<td>71%</td>
</tr>
<tr>
<td>6</td>
<td>Kempinski</td>
<td>6</td>
<td>1,567</td>
<td>1,317</td>
<td>84%</td>
</tr>
<tr>
<td>7</td>
<td>IHG</td>
<td>7</td>
<td>2,055</td>
<td>1,170</td>
<td>57%</td>
</tr>
<tr>
<td>8</td>
<td>Louvre</td>
<td>9</td>
<td>1,128</td>
<td>1,128</td>
<td>100%</td>
</tr>
<tr>
<td>9</td>
<td>Best Western</td>
<td>10</td>
<td>1,033</td>
<td>968</td>
<td>94%</td>
</tr>
<tr>
<td>10</td>
<td>Mövenpick</td>
<td>4</td>
<td>945</td>
<td>945</td>
<td>100%</td>
</tr>
</tbody>
</table>
With the steady growth of tourism arrivals in Africa, international flight demand is on the rise. Air access is becoming increasingly competitive with airlines operating out of the United States, Europe, Asia, and the Middle East.

### Air Passenger Market Analysis

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>RPK</td>
<td>ASK</td>
</tr>
<tr>
<td>Africa International</td>
<td>7.5%</td>
<td>5.9%</td>
</tr>
<tr>
<td>Domestic</td>
<td>7.0%</td>
<td>5.7%</td>
</tr>
</tbody>
</table>

YTD: Year-To-Date  
RPK: Revenue Passenger Kilometers  
ASK: Available Seat Kilometers  
PLF: Passenger Load Factor

Source: Air Passenger Market Analysis, IATA, August 2014
EXAMPLES OF ATA MEMBER AIRLINES WITH ROUTES FROM THE U.S., EUROPE,
AND AFRICA EXPANDING OPERATIONS ACROSS AFRICA

Arik Air
Luanda, Angola; Benin City, Cotonou, Benin; Douala, Cameroon; Banjul, Gambia; Accra, Ghana; Monrovia, Liberia; Abuja, Asaba, Calabar, Enugu, Gombe, Ibadan, Ilorin, Jos, Kaduna, Kano, Lagos, Owerri, Port Harcourt, Sokoto, Uyo, Warri, Yola, Nigeria; Dakar, Senegal; Freetown, Sierra Leone; Johannesburg, South Africa.

Brussels Airlines
Luanda, Angola; Cotonou, Benin; Ouagadougou, Burkina Faso; Bujumbura, Burundi; Douala, Yaoundé, Cameroon; Kinshasa, Democratic Republic of Congo; Banjul, Gambia; Conakry, Guinea; Abidjan, Ivory Coast; Nairobi, Kenya; Monrovia, Liberia; Agadir, Marrakech, Morocco; Kigali, Rwanda; Dakar, Senegal; Freetown, Sierra Leone; Lomé, Togo; Entebbe, Uganda.

Delta Air Lines
Accra, Ghana; Lagos, Nigeria; Dakar, Senegal; Johannesburg, South Africa.

Additional Key Points:
- Delta offers the most extensive Africa service of any U.S. airline, including two destinations from JFK.
- Delta operates the most flatbed routes from North America to Africa.
- Delta offers a flatbed with direct aisle access to Lagos.
- SkyTeam Alliance Partners provide additional coverage into Africa.
- Air France operates an extensive route network to Africa from Europe.
- Alitalia offers significant capacity to Northern Africa from both Rome and Milan.
- KLM routes stretch into central and southern Africa, including Zimbabwe and Tanzania.

South African Airways
Luanda, Angola; Cotonou, Benin; Gaborone, Kasane, Maun, Botswana; Douala, Cameroon; Brazzaville, Kinshasa, Lubumbashi, Pointe Noire, Democratic Republic of Congo; Lilongwe, Malawi; Mauritius, Mauritius; Beira, Maputo, Nampula, Pemba, Tete, Vilanculos, Mozambique; Walvis Bay, Windhoek, Namibia; Lagos, Nigeria; Dakar, Senegal; Bloemfontein, Cape Town, Durban, East London, George, Hoedspruit, Johannesburg, Kimberley, Mthatha, Nelspruit, Pietermaritzburg, Phalaborwa, Polokwane, Port Elizabeth, Richards Bay, Skukuza, Upington, South Africa; Manzini, Swaziland; Dar es Salaam, Tanzania; Entebbe, Uganda; Livingstone, Lusaka, Ndola, Zambia; Bulawayo, Harare, Victoria Falls, Zimbabwe.

Ethiopian Airlines
Luanda, Angola; Cotonou, Benin; Ouagadougou, Burkina Faso; Bujumbura, Burundi; Douala, Cameroon; Bangui, Central African Republic; N’Djamena, Chad; Brazzaville, Kinshasa, Lubumbashi, Pointe-Noire, Democratic Republic of Congo; Djibouti, Djibouti; Cairo, Egypt; Malabo, Equatorial Guinea; Addis Ababa, Bahir Dar, Dire Dawa, Mekele, Ethiopia; Libreville, Gabon; Accra, Ghana; Abidjan, Ivory Coast; Mombasa, Nairobi, Kenya; Blantyre, Lilongwe, Malawi; Bamako, Mali; Maputo, Mozambique; Niamey, Niger; Abuja, Enugu, Kano, Lagos, Nigeria; Kigali, Rwanda; Dakar, Senegal; Seychelles, Seychelles; Berbera, Hargeisa, Somalia; Johannesburg, South Africa; Juba, Malakal, South Sudan; Khartoum, Sudan; Dar es Salaam, Kilimanjaro, Zanzibar, Tanzania; Lomé, Togo; Entebbe, Uganda; Lusaka, Ndola, Zambia; Harare, Zimbabwe.
Delta Air Lines began flying between the United States and the African continent nearly 10 years ago. During the height of its summer schedule, the airline operates some 50 flights a week, including services from Atlanta to Lagos and Johannesburg, and New York-JFK to Accra and to Dakar. As well as providing travel options for our customers, Delta also works to support the communities that we serve.

Delta’s Force for Global Good program, which includes corporate donations, in-kind gifts and employee volunteerism, focuses on five main areas: advancing diversity; improving global health and wellness; improving the environment; advancing education; and promoting arts and culture.

In Africa, one of Delta’s key programs is its partnership with the Ghana Red Cross Society to fund a year-long malaria prevention campaign. The program, which targets four districts in and around Accra, is especially focused on protecting pregnant women and children under five years of age through the distribution of Long Lasting Insecticide Nets (LLIN) through the “Hang Up and Keep Up” Campaign. A total of 4,000 LLINs will be procured and distributed as part of this program to reach 8,000 beneficiaries.

In Ghana, Delta also sponsors the National Spelling Bee competition organized by the Young Educators’ Foundation. The company has supported the competition for the last three years, and this year’s winner received two flight tickets to attend the global final in Washington, D.C., with her coach.

Delta’s employees are heavily involved in the Force for Global Good program. Recently, employees donated USD 20,000 to a Catholic orphanage in Senegal to buy vital infant medication. In addition, airport teams in Johannesburg regularly donate recycled paper to a local non-profit charitable organization and have distributed redundant duvets from our BusinessElite cabins to orphanages in Johannesburg and Cape Town for the winter season. Elsewhere in Africa, Delta is supporting the Liberian Market Women’s Initiative. The campaign seeks to empower women in business to help exit poverty and provide education for their children.

Conducting its operations in a socially and environmentally responsible manner is central to Delta’s core values. With a proud record of service in Africa, the company will continue its efforts both to improve its service and to give back to the community.
It is no secret that getting around the African continent is not always seamless. Many major airlines fly to Africa from North America, Europe and Asia. However, once travelers arrive in Africa on major carriers, challenges arise for intra-Africa travel (East to West, North to South).

APG, the Air Promotion Group, which represents international airlines around the world, has made Africa a special focus for travelers from North America. The company promotes 13 African airlines and makes it possible to sell airline tickets from any point in North America to any point in Africa.

Airlines in the APG portfolio are based throughout Africa and include the countries of Angola, Botswana, Burkina Faso, Ghana, Mozambique, Namibia, Rwanda, Senegal, Seychelles, Tanzania, Togo, Tunisia, and Zambia. Many of the airlines are the national carriers and all offer an excellent service. It has been said that to truly experience Africa, one must fly on African airlines to see what can only be seen through an African perspective in the sky.

Of course, one of the additional benefits of flying African airlines is the economic impact and job creation that they bring to the continent. When you look at the number of employees in the aviation sector in positions such as customer service, crew scheduling, pilots, baggage handlers, porters, engineers, mechanics, flight attendants, operation planners, lawyers, marketing, administrative staff, flight revenue managers and check-in agents, they number in the hundreds of thousands.

Larger cities in Africa, such as Nairobi, Dar es Salaam, Windhoek and Johannesburg receive numerous international flights on a daily basis. But, what happens when holiday-makers want to experience all that Tanzania has to offer, including visits to Kilimanjaro, Zanzibar and Dar es Salaam all on the one trip? Or what about business travelers that need to be in Angola and Tunisia on the same trip? Through APG, travelers can book flights on smaller regional airlines that combine their flights with international airlines in order to reach these markets.

The African Airlines of the Air Promotions Group Include:

- Air Botswana
- Air Burkina
- Air Namibia
- Air Seychelles
- Antrak Air
- ASKY
- LAM Mozambique Airlines
- Precision Air
- Proflight Zambia
- Rwandair
- Senegal Airlines
- TAAG Angola Airlines
- Tunisair

APG promotes airlines with flights to secondary and tertiary markets throughout the continent. This allows travelers to experience more of Africa and to reach those less-traveled destinations far more easily. Now, visitors can plan their travel from overseas locations and APG can connect them from anywhere in North America and onto intra-Africa flights, creating linkages within the continent and beyond. APG’s goal is to make travel easier and more affordable, with special fares on international flights to the continent, so that visitors can fly to and experience more of Africa on every visit.
According to the Office of Travel & Tourism Industries for the International Trade Administration of the U.S. Department of Commerce, Africa continues to receive a steady flow of tourists from the U.S. market, maintaining an overall growth rate of 34% since 2006. A total of 899,000 overnight travelers visited Africa in 2013, an increase of 15,000 visitors. The outlook for travel to Africa from the U.S. continues to rise, with East Coast travelers – which includes the Middle Atlantic and South Atlantic regions – comprising the greatest share. The region to show most growth between 2008 and 2013 was the West North Central source market, which includes Minnesota, Iowa, Kansas, and North and South Dakota, with a 6.1% increase in travelers.

<table>
<thead>
<tr>
<th>Top U.S. Census Regions for U.S. Travelers to Africa: 2008 vs. 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2013</strong></td>
</tr>
<tr>
<td>South Atlantic</td>
</tr>
<tr>
<td>Middle Atlantic</td>
</tr>
<tr>
<td>Pacific</td>
</tr>
<tr>
<td>West South Central</td>
</tr>
<tr>
<td>East North Central</td>
</tr>
<tr>
<td>West North Central</td>
</tr>
<tr>
<td>Mountain</td>
</tr>
<tr>
<td>New England</td>
</tr>
<tr>
<td>East South Central</td>
</tr>
</tbody>
</table>

Source: Office of Travel & Tourism Industries for the International Trade Administration, U.S. Department of Commerce
The African continent boasts beautiful white sandy beaches, lush mountains and savannahs, teeming wildlife parks, and a rich and diverse cultural heritage. Despite the global economic downturn and ensuing recession in many global regions, the World Bank has estimated that the number of tourists visiting Africa rose by 300% between 1990 and 2012. As one of the fastest-growing sectors of the world economy, tourism has the potential to bolster economic development and social advancement in African countries. The benefits of a robust tourism industry are clear: tourism can create well-needed, stable jobs and fuel economic growth in Africa.

Today, Africa’s tourism industry directly employs about 8.2 million people. This represents 5.3% of the workforce in North Africa and 2.4% of the workforce in Sub-Saharan Africa. The tourism industry could potentially add 3.8 million jobs over the next 10 years in Sub-Saharan Africa, the World Bank estimates. Building a skilled top-notch workforce is critical for the sustainability of Africa’s tourism industry. Many jobs in the tourism industry require mid-level service sector skills, yet personnel with skills at the managerial level are considerably lagging in most African countries.

The McKinley Global Institute’s *Africa at Work* report cites that some 40% of African workers have attained some secondary education. That figure is expected to rise to 48% by 2020. Nonetheless, current low education levels, together with a lack of solid business skills and lack of experience in tourism, are key constraints for Africans seeking upper and middle management jobs in the tourist industry. Advanced education and professional development training programs are needed more than ever.

For African talent to fill the ranks of upper and middle management in large corporations or medium sized enterprises, specialized training programs must be developed and scaled up in management areas such as hotels administration, catering services, finance, and human resources.

Understanding visitors’ needs and expectations and improving customer service are essential skills-sets to boost African tourism. Vocational training for entry-level positions can provide skills in improving front desk management, reception, maintenance, housekeeping, food service, and food preparation.

Increased regional and international investment in the tourism sector can accelerate economic growth, and trigger infrastructure improvements and reform in African nations. Tourism can create 200 full-time formal jobs for each USD 250,000 invested, compared to 100 stable jobs in the resources sector, the McKinley Global Institute report indicated.

Yet, the private sector alone cannot expand the tourism sector without forming partnerships with African governments. Governments must develop an investment strategy for sustainable growth by creating conditions and an enabling environment for private sector activity to flourish. Public investment in education and training, infrastructure, power and transportation will go a long way in building a sustainable tourism sector.

For more than 60 years, the organization that I lead, The Africa-America Institute (AAI), has been dedicated to strengthening human capacity in Africa and promoting the continent’s development through higher education and skills training, convening activities, partner engagement and research. AAI’s short- and long-term managerial and professional development training programs are equipping African professionals with the required workforce skills and tools to effectively take on leadership positions in nongovernmental organizations and small- and medium-sized businesses. We are identifying ways to expand our world-class training programs by partnering with Africa’s tourism sector to increase the number of well-qualified Africans in management positions and train the next generation of Africans to become owners and managers of private sector tourism enterprises.

Amini Kajunju
President and CEO
Africa-America Institute
www.aaionline.org

---

1 World Bank (2013) *Tourism in Africa: Harnessing Tourism for Growth and Improved Livelihoods.*
The travel and tourism sector offers a tremendous opportunity to counter the greatest problems that global citizens face today. This is especially the case for the African continent, which despite its bountiful natural resources, continues to face major challenges in terms of infrastructure, food security, poverty and income inequality.

If you look at the heart of Africa, the continent’s greatest tourism assets are its people, its humanity, and its warm hospitality. African countries have the potential to engage and empower citizens in national, regional, and local tourism development. The African tradition of hospitality, eagerness to learn and share knowledge, zeal to contribute, desire for peace, and enthusiasm to relate meaningfully to other cultures, are all positive attributes which indicate a deep humaneness.

The innate curiosity to discover what “lies yonder” inspired the first travelers to venture out of their homelands, and would become the driving force in giving rise to diplomatic relations between nations, cultures, and people. One example is the professional state-to-state diplomacy amongst nations, which is typically managed by Ministries of Foreign Affairs. The other form is citizenship diplomacy or cultural diplomacy, which bears the greatest similarity to the origins of human diplomacy, as it builds bridges between cultures and fosters understanding between individuals.

Citizen diplomacy is a powerful tool that all people can leverage to bring about a shared understanding through person-to-person interactions. Citizen diplomacy builds an individual and collective global fluency, which, in turn, can create economic opportunity and contribute to peaceful and stable international relations, while developing leadership skills through global problem solving and collaboration.

Tourism and travel build bridges between nation-states, even with governments that may disagree with each other. American travelers, for instance, continue to be the leading overseas tourism market for Zimbabwe, despite the political relations between the two countries.

Ohio State University’s Office of International Affairs has launched an initiative which sends several of its students to various regions of the world to acquaint themselves with the diverse cultural, economic, and political traits of their host country. Studying abroad for any student clearly changes the way they view the world, and Ohio State will introduce a program in Zimbabwe for 2016. Imagine if all universities implemented similar programs for their students to travel to, and study at, African universities.

Citizen diplomacy can work wonders, not only for relations between African nations, but also for relations across cultures and religions within the same country. In this era of unprecedented interconnectivity and fast travel, individuals from around the world have the ability to share information and ideas in order to resolve common problems for the collective good. In Africa the economic and social opportunities of citizen diplomacy are limitless.

Honorable Eng. Walter Mzembi
Zimbabwe Minister of Tourism and Hospitality Industry; ATA President (2012-2014)
On January 22nd 2014, New York University, Africa House Director Prof. Yaw Nyarko convened a special collaborative forum bringing together farmers, students, civic leaders, and tourism practitioners for the launch of the inaugural edition of the Africa Tourism Monitor 2013 report. The forum was hosted at the Tweneboa Kodua Senior High School in Kumawu, in the Sekyere Afram Plains District, Ashanti Region of Ghana. The event titled “Rural Tourism & Greening as Drivers for Economic Transformation” took the format of a public town hall meeting. This provided an unparalleled opportunity for a cross-section of the community to openly discuss the role tourism can play in improving livelihoods and providing local economic opportunities.

The decision to launch the report in the Afram Plains District was founded on a recognition of the unique potential for economic empowerment via the tourism sector, while drawing attention to the numerous tourism assets in the area, such as the Bomfobiri Wildlife Sanctuary, which is managed by the Ghana Forestry Commission.

Forum stakeholders included:
- Hon. Philip Basoah, Member of Parliament, Kumawu Constituency
- Hon. Samuel Asiamah, District Chief Executive - Kumawu
- Hon. Fuseini Donkor, District Chief Executive - Sekyere Afram Plains Sanaahene and Samaahene (local chiefs)
- Mr. Ekow Sampson, Ghana Tourism Authority, Regional director, Ashanti Region
- Mr. Joseph Binlinla, Manager Bomfobiri Wildlife Sanctuary
- Dr. Adu Bredu, Deputy Director, Forestry Research Institute, Ghana
- Mr. Kwadwo Sarpong, Officer, Ministry of Food & Agriculture
- Dr. James London
  Mr. Shalom Danso, Forest Research Institute of Ghana (FORIG)
- Mr. Kofi Yankson, Building and Roads Research Institute (BRRI)
- Mr. Nantwi – Headmaster of TKSHS
- Teachers of TKSHS
- Local Assembymen

Bomfobiri Wildlife Sanctuary – Tourism Facts
- Situated in the Ashanti Region, Ghana
- Size: 53km²
- 1 hour drive from Kumasi, Ghana
- 6° 54" to 6° 61" N lat. & 1° 07" to 1° 13" W long.
- Vegetation zone: Dry semi-deciduous forest
- Annual rainfall: 1331.7 mm
- Temperature: 24-26°C
- About 6km NE of Kumawu
- 26 species of mammals
- Several species of primates:
  - Bosman’s Potto
  - Senegal Bush Baby
  - Anubis Baboon
  - Mona Monkey
  - Green Monkey
- Duikers, buffalo, Forest Genet, Porcupine, African Civet and the Red River Hog
- 200 species of birds on record, including:
  - Red fronted parrot, Great Blue Turacos and Yellow Casqued Hornbill
- 3 species of crocodiles

Eddie Mandhry
Associate Director
NYU Africa House
“It is fundamentally important for members of the rural communities such as Kumawu, to actively participate in open dialogue with their civic leaders on the role tourism can play in promoting economic transformation. The launch of the Africa Tourism Monitor report in this rural setting shines the spotlight on the vast opportunities that exist for greater investment and further development of the sector as a means towards more inclusive economic growth in far-flung parts of Ghana. Through collaborative research projects using GIS mapping technology, we hope to further develop local maps that highlight the valuable flora and fauna present within Kumawu.”

Professor Yaw Nyarko, New York University, Department of Economics, Director of NYU Africa House

“Tourism can serve as a key pillar of economic transformation. My constituency of Kumawu is no exception. In particular, I think there is need for greater investment through partnerships in the development of the Bomfobiri Wildlife Sanctuary in order to attract greater numbers of adventure tourists nationally, regionally, and internationally. At the same time, there is need for greater investment to train locals to ensure residents can benefit from the employment opportunities resulting from tourism both directly in services such as hospitality and tour guides, as well as indirectly in the production and sale of local art, Kente, souvenirs, and trinkets contributing to the expansion of our local economy.”

Honorable Philip Basoah, Member of Parliament, Kumawu Constituency, Ghana

“Rural tourism engenders national cohesion and alleviates poverty through the distribution of income from urban rich to the rural poor.”

Mr. Ekow Sampson, Regional Director, Ghana Tourism Authority, Ashanti Region, Ghana

“The tourism sector is a real catalyst that could induce substantial impact on the livelihood of local people and to a large extent the economy of Ghana, if given the needed impetus. Benefits flowing from tourism could be direct or indirect. With its labor-intensive nature, the sector could offer direct employment to a substantial number of skilled, semi-skilled or even unskilled labor that could positively affect the teeming unemployed population in the country. It is important to realize that since most tourist destinations and tourism in the country function in the rural areas, it also has the added advantage of offering formal sector employment options for a majority of the poor literate and semi-literate youth in these rural areas and thereby curbing the menace of rural-urban migration.”

Mr. Joseph Binlinia, Park Manager, Bomfobiri Wildlife Sanctuary
Economic Backdrop
Tourism is a key sector among the economic pillars established under the Kenya Vision 2030 economic roadmap. In Kenya, tourism contributes 12% to Gross Domestic Product (GDP) and accounts for 9% of total employment. Like other key economic sectors in Kenya, tourism has faced challenges due to security incidents, which led to an 18% drop in tourism arrivals last year alone. However, the Kenyan Government has implemented new security measures to support and ensure the viability of the sector.

Tourism Recovery
In 2014, a Tourism Recovery Task Force was created to develop solutions for reviving the tourism sector in the country. This included the establishment of a National Crisis Committee, tasked with developing safety and security protocols and crisis management to support a robust tourism environment. According to the Kenya Tourism Federation, the agreed short-term market recovery measures include:

- Destination perception management through media engagement to manage reporting, media campaign and endorsement by local celebrities;
- International media familiarization trips; and
- Reassurance visits to the traditional source markets.

Tourism Rebound
Under the theme "Recovery: Getting Kenya’s Tourism Back on Track," the 2014 Magical Kenya Travel Expo (MKTE) brought together buyers and sellers from 36 countries from around the world. Organized by Kenya Tourism Board (KTB), MKTE created unique business opportunities for tour operators, travel agents, and destination managers. Additionally, the Kenyan government has provided economic incentives as well as infrastructure improvements to facilitate and encourage investment in the tourism sector. In the hotel sector, Kenya has attracted international hotel chains such as Kempinski Villa Rosa, Rezidor Hotel and Best Western; the Billionaire Club owned by Flavio Briatore; Mahali Mazuri owned by Sir Richard Branson; as well as additional properties in Nairobi and other parts of the country. Opportunities exist to develop tented camps, campsites, lodges, and eco-lodges.

The Jomo Kenyatta International Airport (JKIA) is currently undergoing expansion and modernization to position Kenya as an economic hub for East Africa.

In September 2014, Kenya won top prizes at the World Travel Awards (WTA), which celebrate excellence in the tourism sector, especially amongst hotels and travel companies. Diani Beach was voted Africa’s top beach resort, while Kenya’s Maasai Mara National Reserve was voted Africa’s leading National Park and the 8th Wonder of the World for its spectacular annual wildebeest migration. The national tourism marketing agency, the Kenya Tourism Board (KTB), was voted the Best Tourism Board in Africa for the third time in a row.

Kenya invites visitors to visit and create memorable experiences in Magical Kenya.
“Cultural tourism” is a broad concept used to describe attractions and activities for travelers seeking greater knowledge, self-development and to experience other cultures. Cultural tourism is not new, but it has evolved from a niche travel market into an experience that can be incorporated into any traveler’s itinerary – regardless of the primary reason for visiting a destination.

Cultural tourism knows no geographic bounds; travelers interested in cultural tourism could be your next-door neighbor or someone from half-way around the globe. With that in mind, many countries are investing in actively building their cultural tourism product, not only to attract the dedicated cultural heritage tourist, but also to entice all tourists to stay longer and benefit from a broader experience of the destination.

Each country in Africa holds a unique cultural heritage appeal, especially for international travelers from highly industrialized nations. Many African countries are fortunate to have a rich array of cultural experiences and activities that can be developed to appeal to the long-haul international visitor. These range from African arts and crafts, to music and dance, to homestays and culinary experiences. But how do you begin building capacity to advance cultural tourism in a way that will appeal to the international visitor, especially one that is not an aficionado on the cultural topic?

As a starting point, ask yourself these ten thought-provoking questions before you start making plans, securing funding, and breaking ground.

Of course, there are many more details to undertake in cultural heritage tourism development. But if your goal is to build capacity in cultural tourism with an eye on attracting international visitors, answering these questions will help guide your path to success and increased visitation.

10 Questions to Ask When Developing Cultural Tourism Products

1. What are the international source markets for your current visitors, and what are their primary interests in visiting your country?
2. What aspects of your unique cultural heritage do you want the international traveler to understand better and experience?
3. Is the cultural story you want to tell intriguing enough to attract the attention of a sufficient volume of international visitors?
4. How close, and easily accessible, are the cultural activities and attractions you have now, or can develop, to attract tourists?
5. If your cultural tourism product is not geographically close to popular travel itineraries, is there enough cultural tourism appeal and variety of activities and experiences in the new area to warrant overnight stays?
6. Is the existing tourist infrastructure adequate to enable you to accommodate your target market?
7. How well do you understand the cultural norms of your primary international tourists, and their expectations, in order to create a satisfying visitor experience?
8. How will you involve the local community and key stakeholders (such as subject matter experts) in concepting, developing, and maintaining the cultural tourism product so they not only benefit, but also take personal pride in ensuring its success?
9. Do people in the local community have the necessary technical, operational and/or guest relationship skills to manage the tourism product and guest experience?
10. If not, what training is available and how long would it take for skills transfer, and what processes/systems will be put in place to ensure these skills remain current?
Social Inclusion & Sustainable Tourism Development

The topics of social inclusion and sustainable tourism development are timely, especially in emerging destinations. It has been shown that positive economic and social impacts can be sustainably achieved where such strategies have been implemented. Gambia, Rwanda, Uganda, and Zimbabwe are some of African destinations that can serve as case studies for implementation of successful best practices. Depending on the context, various strategies can be suggested as part of an action plan for a destination.

By focusing on the inclusion of low-income populations within tourism development strategies, adopting a multi-stakeholder approach, and ensuring that there is enough demand, tourism can have significant positive impacts on the economy of African destinations, both at local and national levels. Appropriate strategies, depending on the context of the destination, can – if implemented correctly – make way for a tourism industry that can be socially inclusive and sustainable for generations to come.

Thomas Armitt
Experiential Travel Specialist, Associate, Founder:
Simply Experience.travel / International Centre for Responsible Tourism West Africa / West Africa Discovery
www.simplyexperience.travel

Some of the fundamental recommendations that are part of national inclusive growth tourism strategies include:

- **Assign a strategic lead** for inclusive tourism, whereby a position is created within the tourism authority to ensure consistency and on-going implementation of action plans, with a mandate to keep a clear focus on low-income populations.

- **Expand and diversify arts and handicrafts** by supporting the expansion of arts and handicrafts enterprises through physical infrastructure (markets), investment in capabilities and coordination, and marketing and communication.

- **Develop guiding opportunities, cultural excursions, entertainment, and heritage sites.** Support guiding or regional associations to utilize the potential of experiential and cultural tourism product offerings.

- **Upgrade the food supply chain** by increasing direct market access for local food suppliers (e.g. farmers, fishermen); encouraging tourism enterprises to introduce supplier codes of conduct to ensure fair pricing and trade agreements; building a supportive business environment for local suppliers; celebrating local food as part of the tourism product; and facilitating trading relations between hotels, restaurants and local suppliers.

- **Invest in the development of hospitality and tourism vocational skills** among low-income populations. This can be achieved by establishing hospitality training schools that cater to people from low-income households who have the potential, but who lack the experience of working in the hospitality and tourism sector, as well as collaborating with industry partners to provide internships and entry-level job opportunities.
When asked why their coffee is so good, farmers in Uganda say it is because “the soil is sweet.” This response is one example of why Uganda’s greatest asset is not its incredibly fertile soil, but its friendly people.

Indeed, it was Uganda that taught me that “good coffee comes from good people,” and that the best way to get good coffee is to invest in good people. That is the founding philosophy behind Crop to Cup Coffee Importers, which began nearly ten years ago to market Ugandan coffees in the United States. From videos and maps, to postcards and community projects – this marketing was focused on making genuine connections between coffee lovers and coffee farmers. And it succeeded.

- Google’s offices in Chicago purchase Ugandan coffee because farmers were able to use Google Hangouts to video-chat with their staff about their coffees.
- The Illinois Institute of Technology organized an entire course for engineering students to learn about coffee processing in Uganda. The campus is a loyal customer of Ugandan coffees, and has sent students over to visit as part of their educational exchange.
- After the host of Travel Channel’s show ‘Dangerous Grounds’ came to Uganda, he pledged on national television to be a customer of Ugandan coffees for life.

It seems then that the best way to promote Uganda is to encourage travel to Uganda. Each person we have brought along with us has come back as a lifelong advocate for everything that the country produces. Crop to Cup has a long waiting list of people who want to come, and we look forward to creating new customers with every visit.

Crop to Cup Coffee Importers imports coffees for resell to US-based coffee roasters. Working in partnership with Ugandan groups like the Ugandan Coffee Development Authority (UCDA), we have seen the demand for coffees from Uganda grow incredibly, and along with it, the country’s reputation as a source for quality coffee exports. Whether by causation or correlation, it is no coincidence that an increase in demand for coffees from Uganda coincides with an increased interest in traveling to Uganda.

Coffee and tourism go hand-in-hand, and coffee tourism itself is a growing market.

Jake Elster
Farmer Representative
Crop to Cup Coffee Importers
www.croptocup.com
ATA’s 39th Annual World Congress, November 11-16, 2014

The Africa Travel Association (ATA) will hold its 39th Annual World Congress in Uganda from November 11-16, 2014. Known as the “Pearl of Africa,” Uganda is a country with the best of everything the continent has to offer tourists, with an abundance of natural and cultural assets, strong eco-tourism products, and an emphasis on community, rural and adventure tourism. Hosted by the Uganda Ministry of Tourism, Wildlife and Antiquities, the conference develops the theme “Tourism is Everyone’s Business.”

Uganda Tourism Fact Sheet

- **Capital:** Kampala
- **Population:** 35.9 million (2014)
- **Time:** GMT/UTC plus three hours
- **Currency:** Uganda shilling (USH)
- **Government:** Republic
- **Official Language(s):** English, Luganda
- **Visa Requirement:** EAC and/or Uganda Visa

2013 Tourism Statistics

- **Total Arrivals:** 1,206,000 (2013); 1,197,000 (2012)
- **Total Receipts:** 1,184,000 (2013); 1,135,000 (2012)
- **GDP Direct Contribution%:** 5.3%
- **GDP Total Contribution%:** 7.9%
- **Employment Direct Contribution%:** 182,500 (2.8%)
- **Employment Total Contribution%:** 452,000 (6.9%)

Notable Facts:

- Uganda is home to over 50% of the world’s gorilla population.
- There are 10 National Parks and over 1,000 bird species in Uganda.
- Uganda is the home to 3 UNESCO World Heritage Sites including the Bwindi Impenetrable Forest, Rwenzori Mountains, and the Tombs of the Buganda Kings in Kasubi.
- Cultural Assets: The largest ethnic communities include the Baganda, Banyakole, Basoga, Bakiga, Iteso, Langi, Acholi, Bagisu, Lugbara, and Bunyoro.

Uganda Ministry of Tourism, Wildlife and Antiquities
www.tourism.go.ug
Uganda Tourism Board
www.visituganda.com
Uganda Wildlife Authority
www.ugandawildlife.org

Experience Uganda
the Pearl of Africa
Africa Travel Association Statement on the Ebola Crisis

October 15, 2014

The Africa Travel Association (ATA) is the leading global trade association promoting travel and tourism to Africa and strengthening intra-Africa partnerships for the sector. Established in 1975, ATA serves both the public and private sectors of the international travel and tourism industry. ATA members include African governments, tourism ministers, tourism bureaux and boards, airlines, cruise lines, hotels, resorts, front-line travel agents, tour operators, and the media. ATA partners with the African Union Commission (AUC) to promote the sustainable development of tourism across Africa.

ATA remains deeply concerned about the Ebola outbreak and its far-reaching effects – as well as related perceptions – on the travel and tourism sector in Africa. According to the World Health Organization (WHO), the most severely affected countries are Guinea, Liberia, and Sierra Leone. However, the Africa tourism industry is experiencing severe repercussions across the continent through economic losses, canceled flights and bookings, closed borders, and negative perceptions. These impacts reach far beyond the borders of the countries affected.

ATA urges the travel industry and traveling public to remain vigilant. However, it acknowledges the immense size of the continent and urges tourists to continue to travel to the vast majority of the countries that remain safe. With a landmass of 30.2 million square kilometers and 54 independent countries, the African continent is larger than China, India, and the United States combined.

ATA does not support the cancelation of flights to Guinea, Liberia, and Sierra Leone as this creates further isolation, impeding the delivery of critical medical supplies and travel by aid workers, which can exacerbate the situation. According to the WHO, the countries affected “have very weak health systems, lacking human and infrastructural resources, having only recently emerged from long periods of conflict and instability.”

Now, more than ever, ATA hopes you will join our association in supporting and standing in solidarity with Africa. ATA calls on travelers to make educated and rational decisions and cautions against the influence of sensationalized media. Africa has always suffered from challenges of perception, largely stemming from ignorance and a lack of understanding of the continent by citizens from around the world.

Despite these challenges, ATA remains optimistic about travel and tourism to the African continent. In 2013, Africa welcomed over 65 million visitors, consistently increasing its share in the global travel marketplace. Africa is one of world’s most dynamic travel destinations for tourists seeking adventure, exceptional cultural exchange and heritage tours, diverse culinary experiences, unparalleled safari and wildlife opportunities, first-class beaches, and a wealth of investment opportunities. In pursuit of its mission, ATA believes that tourism is a powerful tool for promoting economic growth, job creation, investment and cultural exchange.

Additionally, ATA encourages travelers to find the most up-to-date and accurate information on these websites:

- Center for Disease Control and Prevention (CDC): www.cdc.gov/vhf/ebola
AFRICA TRAVEL ASSOCIATION (ATA)

The Africa Travel Association (ATA) is the world’s leading travel trade association promoting travel and tourism to Africa and strengthening intra-Africa partnerships to make it happen. Established in 1975, ATA serves both the public and private sectors of the international travel and tourism industry. ATA membership comprises African governments, their tourism ministers, tourism bureaus and boards, airlines, cruise lines, hotels, resorts, front-line travel sellers and providers, tour operators and travel agents, students and young professionals, multi-platform media, and affiliate industries. ATA’s annual events in Africa and the United States bring together government leaders and industry professionals to shape Africa’s tourism agenda and showcase the continent’s latest trends and products. ATA is registered as a non-profit trade association with headquarters in New York and chapters around the world.

www.africatravelassociation.org
NEW YORK UNIVERSITY-AFRICA HOUSE

New York University-Africa House is an interdisciplinary institute devoted to the study of contemporary Africa, focusing on economic, political, and social issues on the continent and programs in the Arts. Part of Africa House’s core mission is to advance the understanding of the links between Africa and the rest of the world, through the social, historical, economic and other lenses. Related to this, we also have relationships with African immigrant communities in New York City. NYU has a large number of professors and students doing research in the areas of economic development, economic growth and macroeconomics, microfinance, analysis of the effectiveness of foreign aid, politics and political economy, law and legal institutions. Africa House regularly convenes high level talks and seminars, and has in the past welcomed African heads of state. NYU-Africa House programs take place in New York City and in various capitals in Africa.

www.nyuafricahouse.org

AFRICAN DEVELOPMENT BANK GROUP (AFDB)

The African Development Bank Group (AfDB) is a regional multilateral development finance institution established to contribute to the economic development and social progress of African countries that comprise its 54 Regional Member Countries (RMCs). The AfDB was founded following an agreement signed by member states on August 14, 1963, in Khartoum, Sudan, which became effective on September 10, 1964. The AfDB comprises three entities: the African Development Bank (ADB), the African Development Fund (ADF) and the Nigeria Trust Fund (NTF). As the premier development finance institution on the continent, the AfDB’s mission is to help reduce poverty, improve living conditions for Africans, and mobilize resources for the continent’s economic and social development. The AfDB headquarters is in Abidjan, Côte d’Ivoire.

www.afdb.org